



City of Norman
Building an Inclusive Community

REQUEST FOR PROPOSAL

RFP Number: 1516-41

Service: ERP Software Vendor Selection Consulting

Date Issued: 02/29/2016

User Department: ALL

Request for Proposal Deadline: March 21, 2016 at 5:00 p.m.

The enclosed REQUEST FOR PROPOSAL and accompanying SCOPE OF WORK are for your convenience in submitting an offer for the enclosed referenced service for the City of Norman Information Technology Department.

Please return responses electronically to summer.buesing@normanok.gov .

or

Return one original and one copy of the entire packet along with any descriptive literature to the following address:

City of Norman
Information Technology Dept.
201 W. Gray Street, Bldg. C
Norman, OK 73069
Attention: Tim Powers

The City of Norman Information Technology Department appreciates your time and effort in preparing this proposal. All proposals must be received at the designated location by the deadline shown. Proposals received after that deadline will be considered void and unacceptable.

If you do not wish to submit a proposal at this time but wish to remain on the source list for this service, please submit a "NO OFFER" by the same time and at the same location as stated above. If a response is not received in the form of an "OFFER" or a "NO OFFER" for three consecutive Requests for Proposal, the offer shall be removed from our source list for that service. If you are submitting a "NO OFFER", we ask that you indicate any requirement of this Request for Proposal which may have influenced your decision to submit a "NO OFFER".

If you have any questions or concerns, contact Kari Madden at (405) 366-5361 and reference this RFP.

ERP VENDOR SELECTION CONSULTING SERVICES

REQUEST FOR PROPOSAL # 1516-41

1. **PURPOSE:** The City of Norman is requesting proposals for qualified Consulting firms to provide a costing for consultant or consultants to conduct a needs assessment, develop a Request for Proposal (RFP), evaluate and score responses for the city's Enterprise Resource Planning (ERP) Software solution, assist with the development of demonstration scripts, assist in evaluating demonstrations, contract negotiations, implementation, testing and acceptance of final software solution. Previous experience with evaluating ERP vendors and implementations of similar size and scope projects and cities is required for this project. This Request for Proposal must be completed in its entirety.
2. **TIMELINE:** The City of Norman has funds available for the current year to allocate for ERP consultant selection. The selected consultant will assist with a needs assessment and development of an RFP for vendors to respond to in the calendar year of 2016. The selected consultant(s) will work with the City of Norman staff to ensure budgetary pricing is available through the RFP process for Council consideration no later than November 10th, 2016 for a ERP software solution. A tentative time table is drafted below to further clarify dates:

Title	Date
RFP Posted for Consultant Selection	February 29, 2016
Responses to Consultant RFP Due	March 21, 2016 (no later than 5:00 pm CDST)
Evaluations by City Staff of Consultant RFP's	March 22 nd – April 1, 2016
Selection of Consultant & Beginning of Contract Negotiations	April 4 th – April 13, 2016
Recommendation of Consultant to Council	April 26, 2016
Consultant released to start work	Following Council acceptance, April 27, 2016
The City of Norman requires a total cost of project by November 4 th to meet budget allocation timelines.	November 4, 2016. Cost for software & hardware solution to present to Council for allocation of funds.

3. **BACKGROUND:** The City of Norman is the third largest City in the State of Oklahoma. The population is estimated at 118,000 and has experienced a consistent growth pattern of about 10 percent in the last 7 years. The City spans an area of 194 square miles in which the majority of the land is rural. The city surrounds the Thunderbird State Park, Thunderbird Lake, and the University of Oklahoma. Interstate 35 dissects the metropolitan area from north to south and State Highway 9 runs east and west. The City is the county seat of Cleveland County and is bordered to the north by Oklahoma City and Moore.

The City's current ERP solution was originally the HTE system and was implemented in March of 1995. Sungard purchased and now owns HTE. The software runs on an IBM iSeries model 520. Sungard modules deployed to date are:

Municipal Courts (Mod)	Cash Receipts
Building Permits	Fixed Assets
HTE Utility	Accounts Receivable
Payroll and Personnel	Purchasing and Inventory
Case Management	Occupational Licenses
Customer Information System	Document Management Services (DMS)
Extended Reporting	Field Connect Building Permits
Global Financials	Government Management and Budgetary Acct.

The Sungard ERP solution also interfaces with New World/Tyler Technologies Public Safety Application, Brazos/Tyler Technologies Traffic Citations, and Badger water meter reading system. The current system does not have real-time failover built in, replication capabilities, or a test environment. These are requirements for a new solution as well as the ability to leverage virtualization using VMWare, replication, snapping and cloning of servers. We require redundancy for the servers via clustering if we so choose. It is preferred that the new solution be Microsoft based, leveraging MS SQL Server, MS Server infrastructure, and virtualization using VMware.

As of December 1, 2015, the City of Norman had a staff of over 850 employees with departments consisting of City Manager, City Attorney/Legal, Finance/Accounting, Information Technology, Human Resources, Utilities, Fire Department, Police Department, City Clerk, Planning and Development, Public Works, Municipal Court, and Parks and Recreation. City hall and administration buildings are located at 201 West Gray Street in downtown Norman. In addition to city hall there are multiple other city owned facilities spread across various portions of Norman.

4. **MISSION:** The mission of the City of Norma is to work together to deliver exceptional service to the citizens of Norman. To fulfill that mission, City of Norman employees pledge themselves to the following core values:

- TEAMWORK – valuing each other’s contribution and encourage teamwork.
- CARING – We value service to others in a caring manner. We listen with a willingness to understand the needs of others. We respond in a friendly, helpful way.
- ACCOUNTABILITY – We are responsible for our work and actions.
- SERVICE – We are committed to providing exceptional service in a courteous, dependable, and efficient manner.
- RESPECT – We respect our differences and treat each other with understanding and dignity.
- FAIRNESS – We seek to understand the needs of others. We strive for equity in the delivery of services and in the treatment of individuals.
- PROFESSIONALISM – We value a knowledgeable, capable, and effective organization.
- RESPONSIVENESS – We value a timely response to both customer and employee.

We believe that these values are the foundation of all our endeavors to make our community a better place now and for future generations.

5. **SUBMISSION OF PROPOSALS:** Proposals shall be submitted in accordance with the following:

5.1 Proposals and changes thereto being electronically submitted shall be submitted to summer.buesing@normanok.gov. The RFP number 1516-41, the phrase “ERP Consulting,” and the date and hour of the proposal closing shall be typed in the subject line of the email.

5.1.1 Electronic submissions shall be any combination of the following formats: Microsoft Word, Microsoft Excel, Microsoft PowerPoint, or Adobe Acrobat. Multiple documents should be submitted in one message. Please zip files if necessary.

- 5.1.2** Electronic submissions shall be in accordance with the deadline set forth in the solicitation document. Any submissions received after the deadline will not be considered. The time of the email will serve as the receipt timestamp.
- 5.2** Proposals and changes thereto which are being submitted to the physical address shall be enclosed in sealed envelopes, addressed with the date and hour of the proposal closing and the services being proposed shall be typed or written on the outside of the envelope.
- 5.3** Facsimile proposals will not be accepted.
- 5.4** Proposals received after the stated proposal closing time and date will not be considered for award.
- 5.6** Receipt of an addendum or amendment must be acknowledged by signing and returning the addendum/amendment with the proposal or under separate cover prior to the time set for the proposal closing.
- 6. INQUIRIES:** Any questions regarding this proposal should be submitted a minimum of 5 business days before the proposal deadline. Questions should be submitted to:

Summer Buesing
Administrative Technician IV
City of Norman
201 West Gray St, Bldg. C
Norman, OK 73069
summer.buesing@normanok.gov

All questions or requests for information should be submitted in writing and the person submitting the request will be responsible for its prompt delivery to the City of Norman. Any interpretation of the request for proposal will be made only by a written addendum issued.

7. SCOPE OF WORK:

The selected vendor will assist City of Norman staff with selection of an ERP Software Solution. Primary functions will include:

- Needs Assessment
- Lead meeting with key city staff to develop technical specifications and system requirements to be used in the development of an RFP to vendors.
- Provide a RFP for an ERP Solution to be used for vendor solicitation.
- Support bidder conferences and conduct appropriate pre-bid meetings.
- Respond to bidder inquiries regarding the RFP and pre-bid meetings.
- Develop technical evaluations and scoring for the RFP based on criteria contained in the technical specifications.
- Arrange for site visits of selected systems and technologies to include key city personnel.
- Assist in evaluating cost and benefit proposals.
- Prepare a written report, outline the evaluation, clarifications, and recommendations, and make presentations, as necessary, explaining evaluation results and recommendations.

- Assist the City staff, where directed, with any board presentations, City Council or other special meetings to present recommendations.
- Develop demonstration scripts in conjunction with City staff to address major core requirements and processes.
- Observe all demonstrations.
- Provide feedback to City staff and assist with final software selection.
- Assist with contract negotiation including warranty and ongoing maintenance, implementation, final testing, and acceptance.

8. INSTRUCTIONS TO OFFERERS:

Your proposals must include:

- Background information including number of years in business and statement of financial condition.
- An organizational chart of the key management positions in your company. Include a description of all locations involved in your services and which location the consultant(s) for City of Norman's project will be located.
- Professional resumes of all individuals who will be assigned to this project. The proposal should indicate the person who will serve as Consultant Project Manager, this person must be maintained throughout the ERP Software selection process.
- A description of experience with similar size and scope government entity projects within the last 3 to 5 years along with 4 references including contact name, phone number, and email addresses.
- A list of any affiliations your company has with software vendors.
- An in-depth description of the proposed strategy to be used in meeting the requirements outlined in Section 7 – Scope of Work, including the individuals responsible and a proposed timeline.
- Describe all resources the City of Norman will be asked to provide in order to complete this project.
- Submit a proposed contract for services to be rendered (including payment terms).

9. METHOD OF SELECTION:

9.1 Right to Reject: The City of Norman retains the right to reject all proposals and to re-solicit if deemed to be in the best interest of the City of Norman.

9.2 RFP Review Process:

The City of Norman will review responses to this RFP that meet the requirements enumerated and are received prior to the designated closing date.

Upon review of all qualified consultants, the selection committee will independently rank all the qualified consultants. The highest ranked consultants may be asked to make an oral presentation for further evaluation.

The City will negotiate a contract based on the services listed in the Scope of Work based on a three (3) step process:

- (a) The selected consultant will be contacted and contract negotiations will begin.
- (b) The City will attempt to negotiate a contract that represents fair and reasonable prices with the selected consultant.
- (c) If the City is unable, after good faith efforts, to negotiate a satisfactory contract with the selected consultant, the City shall formally end negotiations with that consultant and begin negotiations with the next selected consultant.

9.3 Keynotes:

The most important evaluation emphasis will be placed upon the expertise of the individuals assigned to the job related to their consulting services experience with that listed in the Scope of Work. Illustrative and descriptive material and evaluation describing previous work of the consultant is recommended. At the consultant's request, this material will be returned at the completion of the review process, at their expense. Key personnel (by names and position) relative experience and capabilities, as well as sub-contractors, will be evaluated closely.

9.4 Ranking Criteria

Description	Maximum Possible Points
Technical Approach	0 – 30
Experience of key personnel (project team)	0 – 30
References	0 – 20
Cost	0 – 10
Oklahoma Based Consultant	0 – 5
Norman Based Consultant	0 – 5
Total	0 – 100

- 10. SIGNING PROPOSALS:** All proposals must be signed by an officer of the proposer's firm duly authorized to bind the company to the proposal submitted. All requirements of this proposal must be completed and included in the response submitted to the City of Norman. Failure to properly sign the proposal and include all required information may result in the rejection of the proposal.

FORM #1 (PAGE 1 OF 1)
BIDDER/SUPPLIER INFORMATION SHEET

INSTRUCTIONS: To be completed by all respondents

Bidder's Exact Legal Name: _____
(Must be Bidder's name as reflected on its organizational documents, i.e., not a DBA)

List the U. S. State in which Bidder's Legal Entity is organized: _____

Bidder's Type of Legal Entity: (check one)

☐ Sole Proprietorship

☐ Partnership

☐ Corporation

☐ Limited Liability Company

☐ Limited Partnership

☐ Other: _____

Bidder's Taxpayer ID No.: _____

Bidder's Address: _____
Street City State Zip Code

Bidder's Website Address: Email Address: _____

Project Manager:

Legal Contact:

Name: _____

Name: _____

Street: _____

Street: _____

City: _____

City: _____

State: _____

State: _____

Phone: _____

Phone: _____

Fax: _____

Fax: _____ PA

Email: _____

Email: _____

Alternate Project Contact:

Alternate Legal Contact:

Name: _____

Name: _____

Phone: _____

Phone: _____

Fax: _____

Fax: _____

Email: _____

Email: _____

FORM #2 (Page 1 of 1)

INTEREST AFFIDAVIT

STATE OF _____)
) ss.
COUNTY OF _____)

I, _____, of lawful age, being first duly sworn, state that I am the agent authorized by Seller to submit the attached bid. Affiant further states that no officer or employee of the City of Norman either directly or indirectly owns a five percent (5%) interest or more in the bidder's business or such a percentage that constitutes a controlling interest. Affiant further states that the following officers and/or employees of the City of Norman have less than a controlling interest, either direct or indirect, in Seller's business:

By: _____
Signature

Title: _____

Subscribed and sworn to before me this _____ day of _____, 20_____.

Notary Public

My Commission Expires: _____

Notary Commission Number: _____

County & State Where Notarized: _____

FORM #3 (Page 1 of 1)

NON-COLLUSION AFFIDAVIT

(Required by Oklahoma law, 74 O.S. §85.22-85.25)

STATE OF _____)
) ss.
COUNTY OF _____)

I, _____, of lawful age, being first duly sworn, state that:
(Seller's Authorized Agent)

1. I am the authorized agent of Seller herein for the purposes of certifying facts pertaining to the existence of collusion between and among bidders and municipal officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to the bid to which this statement is attached.
2. I am fully aware of the facts and circumstances surrounding the making of Seller's Bid to which this statement is attached, and I have been personally and directly involved in the proceedings leading to the submission of such bid; and
3. Neither the Seller nor anyone subject to the Seller's direction or control has been a party:
 - a.) to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
 - b.) to any collusion with any municipal official or employee as to quantity, quality, or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c.) in any discussions between bidders and any municipal official concerning exchange of money or other thing of value for special consideration in the letting of a contract.

By: _____
Signature

Title: _____

Subscribed and sworn to before me this _____ day of _____, 20_____.

Notary Public

My Commission Expires: _____

Notary Commission Number: _____

County & State Where Notarized: _____

FORM #4 (Page 1 of 1)

AFFIDAVIT OF CLAIMANT

STATE OF _____)
) ss.
COUNTY OF _____)

The undersigned person, of lawful age, being first duly sworn on oath, says that all invoices to be submitted pursuant to this agreement with the City of Norman will be true and correct. Affiant further states that the work, services or material furnished will be completed or supplied in accordance with the plans, specifications, orders, requests or contract furnished or executed by the affiant. Affiant further states that (s)he has made no payment directly or indirectly to any elected official, officer or employee of the City of Norman or of any public trust where the City of Norman is a beneficiary, of money or any other thing of value to obtain payment of the invoice or procure the contract or purchase order pursuant to which an invoice is submitted. Affiant further certifies that they have complied with all applicable laws regarding equal employment opportunity.

Company: _____

TIN: _____

Remit to
Address: _____

City, State,
Zip: _____

Phone: _____

Name (print): _____

Signature: _____

Title: _____

Subscribed and sworn to before me this _____ day of _____, 20_____.

Notary Public

My commission expires: _____

My commission number: _____